

Overview

In order to better manage their agency, Agency Managers may add staff to their Agency to assist with consumer support, application entry and other administrative functions. In the Agency Portal, this new support staff role is referred to as Approved Admin Staff.

Onboarding

Prior to beginning their work for the agency, the Admin Staff must meet specific criteria. Admin staff must:

- Complete their required training and pass a background check – *Agency is responsible for fees associated with background check process*
 - After initial onboarding, you will receive two emails within 24-48 hours
 - Email 1: Notification with access information for training in the Learning Management System (LMS)
 - Email 2: Notification with access to the Live Scan (fingerprint) and Criminal Record Disclosure forms required for background check

Once Admin Staff completes these requirements and the status is changed to Approved, the Approved Admin Staff will need to create a new account within CalHEERS, which will associate them to their Agency. The Agency Manager will assist the Admin Staff in creating this account. The account creation process requires the **delegation code**, the **full legal business name** of the Agency and the **individual email address** (entered during onboarding by the Agency Manager) for the Approved Staff member.

Approved Admin Staff Tasks

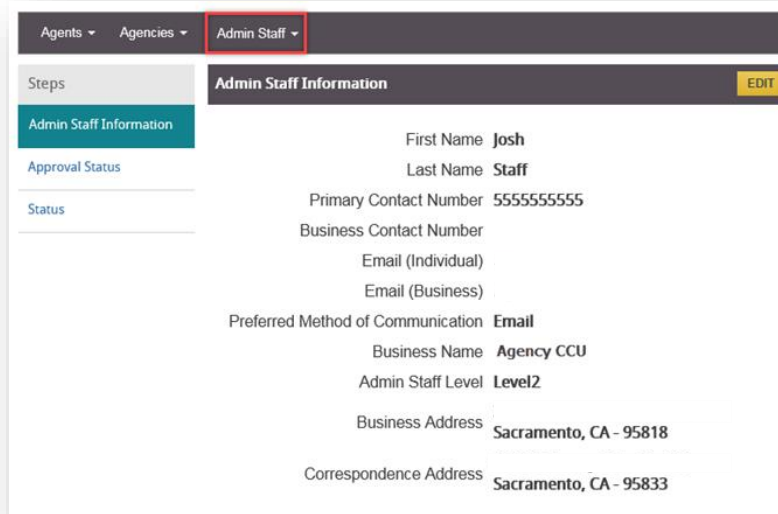
The Approved Admin Staff can assist the agency in multiple ways. The Admin Staff role has two permission levels. Your Agency Manager determines your level during the creation of your profile. You do not have a public profile or carry a license, so you will not be assisting consumers with plan selection, terminations, or APTC adjustments.

Level 1 & 2 Tasks

- Accept pending delegations on behalf of an Agent
- View Agent List/Search for an Agent
- View Active Consumer List
- Start a new application in CalHEERS
- Make updates (Report a Change) to applications
- Complete an application (Submit) to determine consumer eligibility
- Upload eligibility documents for the consumer
- **Call the Agent Service Center for assistance**

Level 2 Tasks

- Add an Agent
- Transfer Consumer delegations **within** an Agency
- Update Agency location and hours
- Document Upload



| Admin Staff Information | |
|-----------------------------------|------------------------|
| First Name | Josh |
| Last Name | Staff |
| Primary Contact Number | 5555555555 |
| Business Contact Number | |
| Email (Individual) | |
| Email (Business) | |
| Preferred Method of Communication | Email |
| Business Name | Agency CCU |
| Admin Staff Level | Level2 |
| Business Address | Sacramento, CA - 95818 |
| Correspondence Address | Sacramento, CA - 95833 |

Approved Admin Staff Dashboard Overview

Below is a screen shot of the headers in the Approved Admin Staff portal:

| Agents ▼ | Agency Delegations ▼ | Agency Account ▼ | My Profile ▼ |
|-----------------|-----------------------------|----------------------|-------------------------|
| View Agent List | Pending delegation requests | Agency Information | Admin Staff Information |
| Search an Agent | Active Consumers | Location and Hours | Approval Status |
| Add a New Agent | Transfer Consumers | Document Upload | Status |
| | Start A New Application | Agency Certification | |

Below is a description of the functions under each tab:

| Agents | Agency Delegations | Agency Account | My Profile |
|---|---|--|--|
| View Agent List: View all agents attached to Agency. Look up status and their site. (Level 1 & 2) | Pending Delegation Requests: View pending delegation requests by consumers to assist with their applications. (Level 1 & 2) | Agency Information: View basic information about agency address, legal name, etc. (Level 2 only) | Admin Staff Information: Your profile information including your contact information and individual email address. (Level 1 & 2) |
| Search an Agent: Search for any agent attached to this agency. (Level 1 & 2) | Active Consumers: Consumers who have an active case within CalHEERS and are delegated to an agent in the Agency. Look up their plan, eligibility status, household details plus more. (Level 1 & 2) | Location and Hours: Update information for hours of operation and business address. (Level 2 only) | Approval Status: Record of your status with delegation code required to create an account in CalHEERS. (Level 1 & 2) |
| Add a New Agent: Create a new profile for an agent. Part of the onboarding process. (Level 2 only) | Transfer Consumers: Assign a consumer(s) to a different agent for handling of their case. (Level 2 only) | Document Upload: Upload documents. (Level 2 only) | Status: The status given by Covered California for your acceptance as an Approved Admin Staff. (Level 1 & 2) |
| | Start a New Application: Begin the online health application for a consumer. (Level 1 & 2) | Agency Certification: View agency status. (Level 2 only) | |